

What is claimed is:

1. In a software suite for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of data sources and accessible through a single interfacing node operated on a data-packet-network, a portfolio-tracking module having a displayable summary interface comprising:

5 an interactive main interface accessible through the summary interface, the main interface for listing stocks and investment accounts for viewing;

10 an interactive menu provided within the main interface for selecting views of individual investment accounts, the views appearing within the same or within a secondary interface;

15 an interactive selection interface provided within the main interface for selecting investment accounts for data tracking;

a first interactive hyperlink embedded within the main interface for linking the main interface to a secondary interface for viewing tracked information about personal investments; and

20 a second interactive hyperlink embedded within the main interface for linking the main interface to a secondary configuration interface for adding new investment accounts or stocks for tracking, characterized in that a user working from within the module may interact with selected ones of interactive links for the purpose of invoking a variety of secondary interfaces containing more detailed information about registered investments, financial 25 accounts, and performance data about stocks.

PCT/US2013/053003

2. The portfolio-tracking module of claim 1, wherein the data-packet-network is the Internet network.
- 5       3. The portfolio-tracking module of claim 2, wherein the plurality of data sources include services accessible over the Internet and subscribed to by the operating user and services made available to the public.
- 10      4. The portfolio-tracking module of claim 3, wherein the accessible services are hosted in file servers addressed on the Internet network.
- 15      5. The portfolio-tracking module of claim 4, wherein the remote node is a personal computer with accessibility to the Internet.
- 15      6. The portfolio-tracking module of claim 5, wherein the summary, main and secondary interfaces are provided in the form of hyper-text-markup-language.
- 20      7. The portfolio-tracking module of claim 4, wherein the remote node is a cellular telephone with accessibility to the Internet.
- 20      8. The portfolio-tracking module of claim 4, wherein the remote node is a hand-held computer with accessibility to the Internet.
- 25      9. The portfolio-tracking module of claim 4, wherein the interactive menu within the main interface contains a selectable list of investment accounts maintained by third-party financial institutions.

10. The portfolio-tracking module of claim 9, wherein data presented on the summary, main, and any secondary interfaces is updated at time of log-in.

5       11. The portfolio-tracking module of claim 10, wherein data presented on the summary, main, and any secondary interfaces is updated periodically at a frequent rate during a session between a user and a server providing the module.

10      12. The portfolio-tracking module of claim 10, further comprising an interactive link to an interface for viewing a portion of shared stocks as listed in a particular selected account.

15      13. The portfolio-tracking module of claim 11, further comprising a plurality of hyperlinks embedded within the main interface individual ones of the hyperlinks associated with individual ones of entities providing account services, the links causing physical navigation to the associated entity maintaining a selected account.

20      14. An interactive portfolio-tracking system for enabling online viewing of itemized investment accounts and stock performance entries tracked across disparate on-line accounts and services over a data-packet-network comprising:

25            a first server node connected to the network, the server node providing a service-access-point for accessing users;

                a second server node connected to the network and accessible to the first server node, the second server node providing automated navigation, data procurement, and data aggregation on behalf of the accessing users;

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a plurality of server nodes connected to the network and accessible to the second server node, the server nodes functioning as private and public data sources for the data procurement and aggregation; and

5           a portfolio-tracking software interface installed on the first server node, the interface accessible to the accessing users connected to the network by respective remote nodes, characterized in that users accessing the first server node from the remote nodes interact with the portfolio-tracking interface for the purpose of viewing detailed and current data according to selected category, the data updated periodically through system 10 update and by result of user request, the portfolio data compiled and aggregated by proxy using cooperative functions of the first and second server nodes.

15           15. The interactive portfolio-tracking system of claim 14, wherein the data-packet-network is the Internet network.

20           16. The interactive portfolio-tracking system of claim 15, wherein the first server node is a portal server providing a personalized interfaces of the form of hyper-text-markup-language interfaces.

25           17. The interactive portfolio-tracking system of claim 16, wherein the on-line accounts and services are accessible over the Internet and are publicly available or subscribed to by the accessing users.

18. The interactive portfolio-tracking system of claim 17, wherein the remote nodes are personal computers with accessibility to the Internet.

19. The interactive portfolio-tracking system of claim 17, wherein the remote nodes are cellular telephones with accessibility to Internet.
- 5        20. The interactive portfolio-tracking system of claim 17, wherein the remote nodes are hand-held computers with accessibility to the Internet.
21. The interactive portfolio-tracking system of claim 17, wherein the second server node stores aggregated data in a connected data repository held externally from the server.

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22. The interactive portfolio-tracking system of claim 21, wherein the portfolio-tracking software interface is linked to at least one secondary interface provided in the form of hyper-text-markup-language, linking achieved through embedded hyperlinking.
- 15        23. The portfolio-tracking system of claim 22, wherein an interactive menu is accessible from within the portfolio-tracking interface, the menu containing a selectable list of online entities maintaining investment accounts, the accounts including IRAs, money market accounts, and retirement accounts.
- 20        24. The portfolio-tracking system of claim 23, wherein a plurality of hyperlinks are embedded in association with individual ones of the account maintaining entities, the hyperlinks, upon invocation, directing navigation to individual Web-sites hosted by the entities.

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25. The portfolio-tracking system of claim 24, further comprising an interactive link embedded in the main interface to a second interface for viewing a portion of shared stocks as listed in a particular selected account.

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26. The portfolio-tracking system of claim 25, further comprising an interactive link embedded within the main interface of the portfolio-tracking software, the link associated with a secondary interface for viewing updated stock performance data, the data updated by accessing a public entity and the data enhanced with summary data known about the requesting user.

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27. The portfolio-tracking system of claim 26, wherein the enhancements to the data procured from a public entity include the quantity of shares and total value of shares held of a listed stock displayed in the secondary interface.

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28. A method for tracking and viewing financial portfolio data including stock performance data rendered in an interactive user-interface accessible through a data-packet-network comprising the steps of:

- (a) accessing an interactive portfolio-tracking interface from a remote node connected to the network;
- (b) pre-configuring and selecting accounts and stocks for tracking and viewing , selection ordered through the interface;
- (c) submitting the pre-configured and selected account and stock data, the data used as criteria for service; and
- (d) viewing the resulting displays of tracked and rendered account and stock data.

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29. The method of claim 28, wherein the data-packet-network is the Internet network.

5       30. The method of claim 29 wherein in step (a), the interactive portfolio-tracking interface is a personalized hyper-text-markup-language interface served by a portal server connected to the network.

10      31. The method of claim 30 wherein in step (a), the remote node is a personal computer with accessibility to the network.

15      32. The method of claim 29 wherein in step (a), the remote node is a cellular telephone with accessibility to the network.

20      33. The method of claim 29 wherein in step (a), the remote node is a hand-held computer with accessibility to the network.